



CROWN Memorandum

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TO: ESRD Executive Directors, ESRD Data Managers
FROM: SDPS Team, Roger Fiori
Project Leader, QualityNet Exchange
DATE: May 19, 2003
SUBJECT: Custom Exchange Group in QualityNet Exchange

The QualityNet Exchange Website has a powerful new feature designed primarily to assist Networks in the exchange of data with other Networks.

By default, QualityNet Exchange limits your list of potential recipients in File Exchange to reduce the possibility of data being sent to the wrong person or place. The list of users in your File Exchange File Upload Wizard are those from your default Exchange Group. Networks can only exchange data files with their healthcare providers or other users within their Network group. QualityNet Exchange has added Custom Exchange Groups that provide File Exchange paths outside of your default Exchange Group. A Custom Exchange Group is a collection of QualityNet Exchange users who can exchange files with each other.

The Custom Exchange Group “Clinical Performance Measures” has already been created allowing the QualityNet Exchange Administrator at each Network, SIMS and REMIS to exchange data with each other. For example: the QualityNet Exchange Administrator from Network13 can exchange files with other healthcare providers in Network13 or with other QualityNet Exchange Users at their Network. Since the user also belongs to the Clinical Performance Measures Exchange Group they could also exchange data with any other member of the Clinical Performance Measures Exchange Group.

Perform the following steps to upload a file(s) to the Clinical Performance Measures Exchange Group:

1. Under the My Works section in QualityNet Exchange click on the **File Exchange and Search link**.
2. Click on the **Upload Files Wizard** icon. The **Select Upload as Group** window is displayed.
3. In the drop down box click on the **Clinical Performance Measures** Exchange Group.

4. Click on the **Choose Group and Go To Upload** button. The **Upload Wizard** window is displayed.
5. To send file(s) to individual users of the Clinical Performance Measures Exchange Group, click on the link to show all users of that organization or group. The users from that organization or group appear in the User list box. Click on the desired users to highlight them. Hold down the Ctrl key to highlight more than one user. Click on the **Add Selected Users** button. The user names appear in the Send File(s) To box.
6. Enter a description of the file(s) in the File Description box, if desired, up to 350 characters. Remember the information entered in the File Description box does not get encrypted.
7. The default archive date is set for 60 days after the file is uploaded. This identifies the date that the file will automatically go into archive status. To change this default, enter the desired number of days in the Archive file(s) entry box.
8. If desired, you may also enter a number in the Alert me entry box to be notified via email if the file has not been downloaded by any of the recipients within that number of days.
9. Click on the **Select, Encrypt, and Upload File(s)** button. A File to Upload box is displayed.
10. Navigate to and select the file(s) that you wish to upload. You can select many files to upload at the same time by holding down the Ctrl key and clicking on each file name. Remember the length of the file name must be limited to 45 characters. Underscores will replace spaces in all file names.
11. Click on the **Open** button. The file(s) is automatically encrypted through the CKM software and uploaded to the database where it is stored in the encrypted format.
12. Once you have uploaded a file, the file will display on the recipient's New tab of the File Inbox section of QualityNet Exchange and your Unopened tab of the File Outbox section of QualityNet Exchange. Click on the **OK** button to upload more files or click on the **Cancel** button to close the Upload Wizard.

Please notify your QualityNet Exchange Administrator if you have any questions. They may contact the QualityNet Help Desk 1-866-288-8912 if additional information and/or assistance are needed.

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